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SUPPORTING ECONOMIC GROWTH AND ANALYSIS II

Quarterly Report October 1, 2005 – December 31, 2005

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INTRODUCTION

The Support for Economic Growth and Analysis and Mandela Economics Scholars Program II (SEGA II) began on August 27, 2004 and continues through August 26, 2007. SEGA II has been designed to support the Economics Capacity Strategic Objective of the USAID South Africa results framework. This first quarterly report for 2006 documents progress made towards achieving USAID's objectives for this program as reflected in the Statement of Work:

- Working with public sector agencies and civil society organizations, perform policy reform analyses that will improve the policy and regulatory environment that reduces poverty and unemployment within a supportive macro-economic environment (emphasizing small business development, trade, investment and intellectual property rights, agriculture and land reform and socio-economic impacts of HIV/AIDS in South Africa).
- Working with these same institutions, and employing both formal and informal training mechanisms, builds South African capacity for policy reform concerning selected priority issues relevant to improving the economic environment in South Africa.
- Collaborate with other donors, in particular the UK's Department for International Development (DFID), in achieving these results.

SUMMARY OF ACHIEVEMENTS

A number of research activities were completed and the results disseminated during the first quarter of Fiscal Year 2006. SEGA II also hosted or participated in several high profile conferences and workshops and developed a new training program for building economic capacity within the National Treasury. Highlights from the first quarter include:

- Social Surveys and Nkuzi Development Association completed a two-year research project (co-funded by Atlantic Philanthropies) on the extent and causes of land evictions in South Africa and presented their findings at a conference in Johannesburg in October 2005. This research has provided the Department of Land Affairs with critical information in an area long overlooked.
- Frank Flatters presented his final analysis (co-funded by USAID/RCDA) of the costs and benefits of the Motor Industry Development Programme (MIDP) to business, labor and policy makers at NEDLAC. This work has received extensive media coverage and raised serious questions about the future of this program.

- SEGA facilitated and supported the participation of MESP II students at the annual TIPS conference in November. During the forum, students attended a career fair aimed at facilitating job placements at South African economic institutions.

TECHNICAL AREAS

While the SEGA II statement of work is diverse, it is clearly unified by its focus on capacity development and a strong orientation towards poverty and unemployment. It identifies 10 technical areas covering a wide range of issues and clients. In each area, activities have been designed to enhance the capacity of government, its regulators, NGO's and universities to design and implement economic policy in South Africa. This is to be achieved through policy research, technical advice and a variety of short and longer term training modules. Progress, by each technical area and activity, is described below and summarized in Annex A.

TA 1: STRENGTHENING THE IMPACT OF PRO-POOR PROGRAMS (SIPP)

SIPP is co-funded by DFID and was established to assist the National Treasury (NT) to incorporate pro-poor concerns into its tax and spending programs. Specific projects are identified by the Treasury and submitted to NT's research committee (a panel of four Deputy Director Generals) for approval. The following SIPP projects have been implemented to date:

- a desktop analysis of the importance of the child support grant within different households and for household members and its possible impact on poverty alleviation (completed);
- an extensive and qualitative analysis of the patterns and determinants of poverty and vulnerability in rural South Africa;
- the development of a demographic model to assist the National Treasury in projecting the long-term size and distribution of the government's major social grants;
- a baseline study of the reach, targeting and effectiveness of the primary school nutrition program;
- a study of the economic impact of South Africa's various land and agricultural policy initiatives in four municipal pilot sites;
- a modeling workshop to assist the Government in planning, budgeting, and evaluating the economic impact of the World Cup 2010 soccer tournament (completed - see Box 1 below).

In addition, SEGA II has contributed significant funding to a capacity building facility to enable National Treasury employees to participate in targeted economic training events in the USA and South Africa. Two employees have already received financial assistance from this facility to undertake short-courses in the United States; and the facility also contributed

towards to costs of the Treasury's representation at the CABRI (Collaborative Africa Budget Reform Initiative)¹ workshop in Mozambique.

Box 1 FIFA 2010 World Cup Modeling Workshop

South Africa is expected to receive a large economic injection from hosting the 2010 World Cup. Initial estimates suggest that the World Cup will contribute R21.3bn into the economy, generating an estimated 12.7 billion in direct spending and creating 159,000 new jobs. These estimates are based on simplistic cost-benefit analysis and fail to take into account resource constraints, preference switching and the diversion or substitution of limited resources.

Government needs to develop methodologies and models to better understand and estimate the economic impact of this event. It also needs to evaluate the magnitude and impact of the World Cup 2010 on public and private investment and the implications of different forms of investment financing (deficit financing and shifting expenditure). Furthermore, it is important to sequence investment and create a coherent link between the World Cup and government's overarching infrastructural expenditure plans.

SEGA II provided support to the National Treasury to convene a workshop aimed at strengthening government's planning, budgeting, and risk management in preparation for the World Cup. The workshop was attended by a number of international experts with prior experience in the modeling and evaluation of large sporting events. The lessons from this workshop will assist the National Treasury in the development of their own models and analyses.

TA 2: PARLIAMENTARY TRAINING

SEGA/MESP (implemented by Nathan Associates) provided extensive formal economic training to South African parliamentarians over the last 6 years and this support was continued by SEGA II. In 2005, SEGA II provided financial assistance to 31 parliamentarians registered for honors in economics and to 15 parliamentarians undertaking a diploma in Economic Policy. Results will be received in January and reported in the next quarterly report.

USAID funding for this training is to conclude in mid-2006 and SEGA II is currently negotiating the transfer of the funding of the program to Parliament. This will include a small increase in funding to enable those parliamentarians that have successfully concluded their 2005 exams to complete their Honors in Economics degree in the first semester of 2006.

¹ CABRI is a professional and autonomous network of senior government officials in ministries of finance *and* planning which aims to improve the efficacy of public finance management in Africa. The CABRI secretariat is located in the National Treasury of South Africa. For more detail see: <http://www.africa-sbo.org/cabri>

TA 3: MICROFINANCE POLICY REFORM

The Microfinance Regulatory Council (MFRC) aims to promote sustainable growth of the micro-lending industry and to ensure the protection of consumer rights. SEGA II (with funding from PRIME) has assisted the MFRC in these areas by providing support to the implementation of the new National Credit Bill and Act. In December 2005, this bill was approved by Parliament and it is expected to come into force in April 2006.

A long-term adviser has been appointed to the MFRC to assist in the ongoing implementation of this legislation. Particular assistance provided in this quarter included:

- Advice on the strengthening of credit reporting regulations;
- Development of the National Loans Register (NLR) – including international comparisons with similar institutions in other countries and the preparation of a strategy document on how the transition of the NLR could be managed;
- Development of a statistical tool for market supervision; and
- Development of a database with up to date knowledge on the credit market in South Africa. Based on this database, a mock over-indebtedness report for the National Credit Regulator was drafted.

A second international consultant was contracted by SEGA II to review pending legislation (as per the National Credit Act) on interest rate regulations.

Upcoming activities will focus on preparing an appropriate education strategy for the National Credit Regulator, targeted at borrowers, credit grantors, credit bureaus, and debt counselors. Furthermore, a baseline market review will be conducted to monitor the impact of the implementation of the National Credit Act on credit providers.

TA 4: AGRICULTURE AND LAND REFORM

Social Surveys and Nkuzi Development Association concluded their substantial survey and analysis of land evictions in South Africa in this quarter. The results were presented at a conference in Johannesburg in November and are summarized in Box 2 below. This work will contribute to the Department of Land Affairs's policy on land evictions and help Government to identify and assist the most vulnerable communities.

A second study of land issues commenced this quarter. The Human Sciences Research Council together with the Programme for Land and Agrarian Affairs was contracted to evaluate the interactions between land reform and rural development in South Africa. The main objective of this study is to clarify the economic case for redistributive land reform in the context of a rapidly changing agricultural economy. This study involves four area-based case studies, two of which will be funded by USAID (through SEGA II). The Project Managers hope to secure co-funding for the remaining two case studies from other donors. Fieldwork is expected to commence in the coming quarter.

Box 2: Land Evictions in South Africa

Social Survey and Nkuzi Development Association conducted a national survey on the extent and impact of land evictions in South Africa in 2005. The overall aims of the survey were to gather and disseminate accurate information on the extent, nature and impact of farm evictions for future development of legislative and programmatic interventions.

The results of the survey show that most farm evictees are black South Africans and long-term farm occupiers. According to the survey, 4,183,427 people were displaced from farms over the last 21 years. Approximately 40% of those displaced were evictees. Women and children comprise 77% of all evictees (women 28% and children 49%) and are identified as most vulnerable.

The number of evictees during any time period depends on different circumstances. Increases in evictions over the years have been attributed to the following factors: severe droughts in 1984 and 1992; political uncertainty; trade liberalization; the passing of the Restitution of Land Rights Act of 1994; the extension of the security of tenure act in 1997 and the coming into effect of the Basic Conditions of Employment act. Conversely, the survey shows that the Labor Relations Act contributed to a fall in evictions from 7.4% in 1994 to 5.0 % in 1995. Increases in farm employment in 1993 also resulted in a large drop in evictions from 10.7% in 1992 to 0.4% in 1993.

The low levels of education among evictees aggravate the impact of land evictions. The survey shows that 37% of all evictees had no education at all, and 76% had not gone beyond primary school. Evictees are also extremely poor with men having an average wage of less than R530 per month and women R322 per month.

After eviction, some evictees continue to live in deplorable conditions in new settlements whilst others find themselves in settlements with better services such as schools, tap water, shops and electricity. In general, the financial condition of evictees makes it difficult for them to access these services. Moreover, the ability of evicted farm dwellers to get help in relocating to new settlements is usually made impossible because they lack awareness of rights, and have limited resources, education and work experience.

The survey also shows that 67.3% of the people evicted from farms end up in urban areas, and this has contributed to an expansion of informal settlements around major cities and increased pressure on the delivery of services in urban areas. This is worsened by the fact that there is currently no provision to accommodate people evicted from farms.

TA 5: HIV/AIDS

South Africa has one of the fastest growing HIV/AIDS epidemics in the world. By 2001, the adult prevalence rate reached 20.1 percent with more than 5.0 million people infected and 50,000 new infections per month. It is now broadly accepted that this pandemic will have an adverse impact on the economy, leading to rising poverty and inequality, but many of the channels through which this will occur remain largely unexplored.

SEGA II tackles two broad areas of work on the economics of HIV/AIDS. First, the program assists government in costing and monitoring the impact of HIV/AIDS on health care workers and the delivery of basic care and treatment to HIV/AIDS patients, orphans and vulnerable children. Secondly, SEGA II supports analysis of the impact of HIV/AIDS on the macro-economy and different industry sectors.

Two large studies were completed in this quarter: The first involved an assessment of the cost and efficiency of different home- and community-based care (HCBC) models in 2 provinces in the country. The results from this study will prove useful in assisting the Department of Social Development to develop appropriate policies and support for HCBCs. The second project analysed the prevalence of HIV/AIDS amongst health service personnel in two Gauteng hospitals. The study showed that HIV/AIDS is not a significant contributor to attrition among nurses. Focus group discussions indicated that salary, workload, lack of professional development prospects and unresponsive management were more important factors.

SEGA II initiated one new project in this area in this quarter. This particular study is a component of a much larger research program evaluating the rollout of ARV treatment at specific pilot sites in the Free State Province. In this component, the researchers will evaluate the extent of stress and burnout among professional nurses in public health care facilities (See Box 3).

Box 3 Occupational Related Stress and Burnout Study

This study is a component of a larger project being implemented by the Centre for Health Systems Research and Development, University of the Free State, which is documenting, monitoring and evaluating the roll out of the ART program in the Free State Province of South Africa.

The success of ART rollout in developing countries depends largely on a contented workforce that is relatively free of occupational-related stress and burnout. Available data from personal interviews and focus groups suggests that professional nurses working in public facilities providing ARVs experience considerable emotional and psychological distress.

The Occupational Related Stress and Burnout Study aims to appraise the influence of the ART program on nursing personnel working in ART sites in the Free State, and how nurses have responded to this program. This will be done by comparing behavioral differences between professional nurses working in PHC facilities that render ARV services and those in facilities that do not. Specific factors to be evaluated include:

- Occupational related stress
- Staff burnout
- Professional quality of life
- Interpersonal conflict in the workplace
- Organizational constraints and quantitative workload

TA 6: REGULATORY REFORM

SEGA II has initiated discussions with the Competition Commission of South Africa with a view to providing technical assistance and capacity building support to this institution over the next few years.

TA 7: ENVIRONMENTAL ECONOMICS POLICY

There is unlikely to be any work in this TA over the duration of the project. SEGA II will continue to monitor developments in this area and will inform USAID if any prospective activities arise for future consideration.

TA 8: INTELLECTUAL PROPERTY RIGHTS

There is unlikely to be any work in this TA over the duration of the project. SEGA II will continue to monitor developments in this area and will inform USAID if any prospective activities arise for future consideration.

TA 9: SUPPORT FOR HIGHER EDUCATION

SEGA/MESP has provided foreign (MESP I) and local (MESP II) bursaries to a large number of South African economics students. The majority of the MESP I students have completed their studies, and of the remaining four, two are expected to defend their dissertations and two to complete writing their dissertations by June 2006. SEGA II will see this activity through to completion.

SEGA II has taken over the management and payment of the final year of MESP II students located in the Universities of Stellenbosch, Cape Town and Kwa-Zulu Natal. Of the 23 MESP II students, only 2 did not complete their coursework in 2005 and will continue into 2006. But a large number of students from this and previous years who completed their coursework have not completed their dissertations. A supplementary bursary was put in place this quarter to provide an incentive to MESP II students who have passed their course work to complete and submit their theses. In total, 23 students will benefit from this grant: 11 from the University of Stellenbosch, 6 from the University of KwaZulu Natal and 6 from the University of Cape Town. Funding for this activity will end in May 2006.

In November 2005 SEGA II organized an Alumni Dinner for MESP I and II students to facilitate interactions between MESP scholars and to provide an opportunity for the MESP II students to become part of the MESP Alumni. SEGA II also facilitated the attendance of MESP II students at the annual TIPS conference and arranged a career session to provide these students with an opportunity to interact with prospective employers.

SEGA/MESP has also supported the University of the Western Cape as a ‘Center of Economic Excellence (CEE)’. Funding for this activity will end in the second quarter of this financial year.

TA 10: COMPLEMENTARY ACTIVITIES

The above technical areas cover most of the key aspects of poverty and unemployment in South Africa, but not all. Notable exceptions include private sector development issues and the impact of globalization on trade, investment, employment and the poor.

SEGA II has worked with South Africa’s largest trade union federation (COSATU) to assist them in developing a research proposal to understand the impact of trade reform on the poor. DFID and the DTI have agreed to contribute significant funding to this project, which now includes 16 sub-components and about 20 different researchers. Research work has begun and SEGA II will continue to provide technical and administrative support to this project.

SEGA II funded the third and final workshop on trade policy in this quarter. This series of workshops was designed to help develop trade capacity amongst the leadership of the country’s three labor federations (COSATU, FEDUSA, NACTU).

To assist private sector development, SEGA II is providing ongoing advice to the National Treasury on the costs and benefits of different kinds of industrial policy instruments. This will include a review of different kinds of sector specific interventions as well as proposal on a number of cross-cutting economic constraints. A final paper will be delivered in the second quarter.

Analysis by Frank Flatters of the Government’s Motor Industry Development Program (MIDP) was completed and presented to NEDLAC this quarter. This work was co-funded by USAID/RCSA. The results show that the cost of the MIDP is much larger than previously envisaged and probably exceed the net economic benefits to South Africa. This work has received extensive media coverage and raised serious questions about the future of this program.

Finally, SEGA II continues to enhance economic capacity within and beyond Government through focused short-term assistance and training. During this quarter, SEGA co-funded the AIDS and Poverty Workshop held in December organized by SALDRU. The main purpose of this workshop was to share research finding demonstrating the interactions between Poverty and HIV/AIDS and discuss methodological issues relating to this research.

BENCHMARKS

The following table provides a summary of the key objectives and results for SEGA II, as established by USAID and included in the Task Order. Existing targets, taken from the

Performance Monitoring Plan for USAID/South Africa's Economics Capacity Building Strategic Objective, have been added to show some of the proposed contributions of SEGA II and to facilitate USAID monitoring of the progress of the project.

	<i>Objectives</i>	2005 (Aug-27-2004 to Aug-26-2005)		2006: Quarter 1	
		<i>Anticipated results</i>	<i>Proposed SEGA II Targets</i>	<i>Performance</i>	<i>Comment</i>
Sustainable capacity-building	Strengthen human resources in economics and policy	Number of historically disadvantaged people completing long term advanced degrees and placed in jobs as economists	N/A	N/A	MESP ended
		Number of people selected for training	N/A	N/A	MESP ended
		Gender Equity – percent women trained	N/A	N/A	MESP ended
		Proportion of graduates working for government	N/A	N/A	MESP ended
	Strengthen centers of economic excellence in teaching and research at historically disadvantaged universities.	Full-time equivalent students	N/A	N/A	Program ended
		Outreach programs with govt, Parl., bus., NGOs	N/A	N/A	Program ended
		Quality Research papers	N/A	N/A	Program ended
Assessments and analyses	Strengthen government departments that deal with policy matters.	Number of directorates strengthened	5	5+	
		Number of quality policy studies completed	30	3	Preliminary report from PLAAS Health care workers MIDP
		People in economics training	200	184	Overseas training for National Treasury CABRI- HIV/AIDS Poverty Workshop
		Gender Equity – Women in Training	40%	32%	59 females/184
	Strengthen think tanks to formulate and deal with economic policy options.	Number of quality studies produced	10	-	Drafts of 2 papers received
		Number of seminar, conferences, and workshops attended by think tanks.	8	4	Solidarity Workshop, HIV/AIDS and poverty workshop FIFA 2010 World Cup Modeling Workshop CABRI
		Black professionals working on assisted activities	20	16	7 economists 9 non economists
		Gender equity – professional women working on assisted activities	12	27	8 Economists 19 non economists

DELIVERABLES

The following deliverables were prepared during the period October 1, 2005 – December 31, 2005.

Technical Area	Activity	Date	Document title. type
SIPP	Vulnerability, labor markets and social protection	November 2005	Treasury 2005 12 livelihoods and vulnerability.ppt Treasury 2005 12 approach.ppt
MFRC	Credit Regulator Advisor	December 2005	MFRC deliverables 01 2006.doc
Land reform	Evictions	October 2005	Summary of Key findings for Conf1.doc
HIV/AIDS	Impact of HIV/AIDS prevalence in Health Service Personnel	1 November 2005	Final report on impact of HIV AIDS on Healthcare Workers.doc
HIV/AIDS	Aids and Poverty		AIDS-Poverty Workshop Programme.doc
Higher education	MESP I	December 2005	Report 2005 MESP 1 Reporting.doc
Higher education	MESP II	November 2005	TIPS Conference Programme.doc List of MESP II Students.doc
Complementary	MIDP	2 November 2005	Final report on the Economics of the MIDP.doc TIPS/NEDLAC Presentation on the Economics of MIDP.ppt
Complementary	Prinsloo		Report on the Capital Markets Course.doc

ANNEX A: SUMMARY OF ACTIVITIES

Project	Description	Objective	Indicative Budget \$	Status
TA1: Strengthening the Impact of Pro-poor Programs (SIPP)				
Poverty workshop	Discussion of key research questions and gaps, between leading academics and senior policy makers	To promote evidence-based policy making	15 000	Postponed
Land-based vulnerability, labor markets and social protection	Analysis of the patterns and determinants of vulnerability and food security in rural South Africa; and a review of government policies in these areas	To recommend new and better policies	295 000	Approved and work has begun Interim report received
Intra-household dynamics in resource allocation	Analysis of the flows of social grants to different types of households and the impact of these grants on household members	To evaluate the allocation and effectiveness of social grants	30 000	Completed
Primary School Nutrition Program	Baseline study and evaluation of the reach and effectiveness of the government's school feeding scheme	To provide baseline data for future M&E	175 000	Approved and work has begun
Social grants projections	Examination of population dynamics and the likely evolution of the economic position of welfare beneficiaries	To estimate the cost and improve targeting of social grants	60 000	Approved and work has begun
Cost of higher education	Assessment of the present and future costs, and the long-term financial sustainability of the higher education system.	To develop a financial model for education planning	-	Awaiting final ToR and tender
Rural municipality case studies	Analysis of the economic impact of land reform projects in four pilot sites.	To clarify the economic case for land reform	75 000	Approved and work has begun
TA2: Parliamentary training				
Parliamentary training	Formal economic training and support to Parliamentarians, especially the Budget Committee.	To improve economic knowledge and capacity in Parliament	150 000	Final installment to be paid Q2 2006
TA3: Microfinance policy reform				
Consumer Credit Act	Evaluation of credit conditions and interest rates in different consumer credit markets	To recommend methodology for determination of interest rate ceilings	60 000	Approved and work has begun

Long-term adviser on Microfinance Policy	Design and implementation of National Credit Regulator (NCR) and development of framework for credit providers	To assist in the design of a regulatory regime for the NCR	230 000	Approved and work has begun
TA4: Agriculture and land reform				
Evictions - national survey	National survey of incidence and socio-economic impact of farm evictions	To inform policy on land evictions and highlight vulnerable communities	150 000	completed
Technical adviser to DLA	Provision of full-time or part-time technical adviser to DLA	To coordinate research and monitoring activities	200 000	Awaiting formal confirmation from Department of Land Affairs
CLRA pilot studies	Design and implementation of CLRA pilot studies in three different provinces.	To monitor and evaluate implementation of the CLRA		
TA5: HIV/AIDS				
Home and Community Based Care (HCBC)	Assessment of characteristics, cost and efficiency of different HCBC models	To recommend appropriate models for scaling up HCBC programs	190 000	Completed
Roll-out of ARV treatment in the Free State Province	Monitoring and evaluation of the roll-out of ARV treatment at specific pilot sites	To highlight progress and obstacles to ARV roll-out	150 000	Started Nov 2005 On going
Impact of HIV/AIDS on health care workers	Analysis of the prevalence of HIV/AIDS amongst professional nurses its impact on attrition and productivity	To assist in human resource development and planning	85 000	Completed
Macroeconomic impact study	Evaluation of the economic impact of HIV/AIDS, by sector	To demonstrate the economic cost of HIV/AIDS	20 000	Draft report received. To be completed January 2006
SA Journals of Economics and Development Perspectives	Publication of special editions, focusing on the economics of HIV/AIDS	To publicize research in this area	20 000	Published and waiting for the journals
TA9: Support for higher education				
MESP 1	Provision of bursaries and support to South African students to undertake post-graduate studies in the USA	To facilitate post-graduate education in economics amongst historically disadvantaged students	-	To end mid-06

MESP 2	Provision of bursaries and support to select academic departments and courses	To facilitate post-graduate education in economics amongst historically disadvantaged students	130 000	To end mid-06
UWC / Center of Economic Excellence (CEE)	Financial support and assistance to the economics department at UWC	To develop and sustain a CEE at UWC	35 000	To end March-06
Placements and internships	Assistance to MESP graduates in finding employment in Government departments or agencies	To help graduates find permanent and appropriate employment	10 000	Ended Dec 05

TA10: Complimentary activities

Development through trade	Provision of support to South African Institute of International Affairs' (SAIIA) trade research and advocacy program	To inform policy makers and business leaders on trade policy developments	35 000	Completed
Trade training for union leadership	Facilitation of two workshops on trade theory and policy for union leadership	To inform union members and leaders on trade policy developments	50 000	Completed
Industrial policy and incentives	Analysis of the relative impact of investment incentives and other investment support initiatives on business decisions and investment	To inform policy makers on optimal investment policy	60 000	Phase 1 Completed. Work has begun on phase 2.
Southern Africa Tax Institute (SATI)	Support to SATI training courses	To enhance tax knowledge amongst policy makers	10 000	Completed
Trade and poverty	Various household and case study analyses of the relationship between trade and poverty.	To understand the way in which trade impacts upon poverty in SA.	50 000	Work has begun